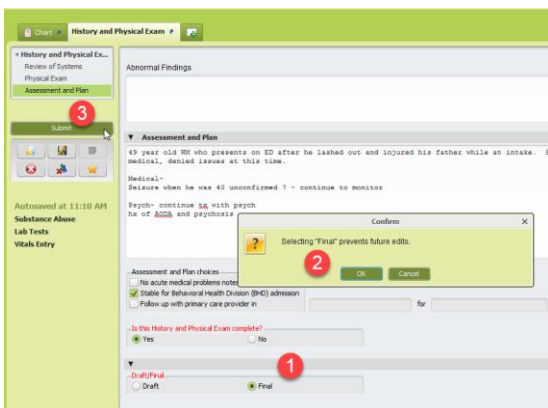


Using Document Routed myAvatar Forms- Any Avatar form that has draft/final designation can be routed to another user for review and approval, or as a notification.

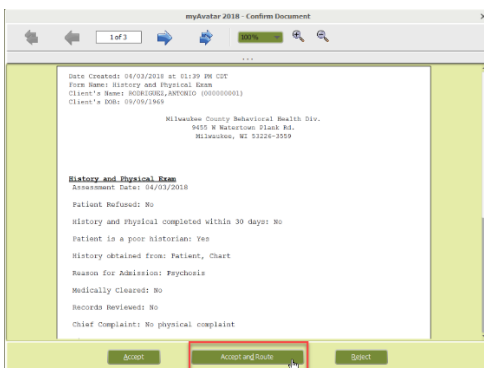
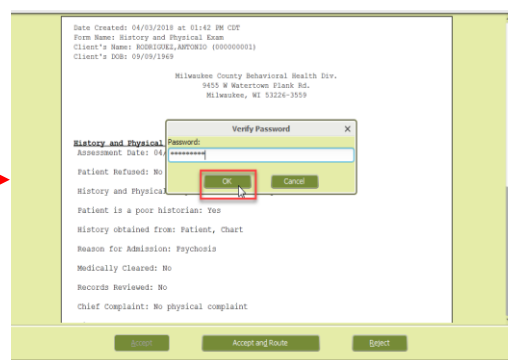
Part 1- Routing Documents

Follow the workflow below to route forms for review/approval/notification.

1. Save the form as Final.
2. The pop-up window is a reminder that this action is Final and forms in Final status can't be edited. Click OK to Submit or Cancel to make any necessary changes.
3. Click Submit.



An image of your document appears (TIFF image). Carefully review the entire document for accuracy and completeness. Note, use the arrow icons to review the second page. If there is an error or missing information, click Reject to return to the form. If the document is final click Accept and Route. Enter your password which serves as an electronic signature and click OK.

The **Route Document To** window appears (below).

This pop up window is part of the Document Routing process and allows end-users to modify any system defaults for document routing. The editing is extremely beneficial when staff members need to route their document to another staff member as a notification.

1. If the clinician wishes to add a Supervisor who is not defaulted into the lists, the **Supervisor** lookup can be utilized to search for an available Supervisor.
2. If the clinician wishes to add an approver who is not defaulted into the lists, the **Add Approver** search can be used. There can be several Approvers listed as needed.
3. If the clinician wishes to add approvers or staff members to notify to the list, and the agency uses care Teams, the **Add Team** search can be used. **BHD is not currently using the Team functionality.**
4. If the clinician wishes to add additional staff to the notify list, they can use the **Add Staff to Notify When Final lookup**. All staff members will be listed in the search results.
5. Once all staff members are listed, a simple check mark in the appropriate column will determine if the staff member is an **Approver**, or the system will **Notify** the staff member once the document is final.
6. Click **Submit** to accept the changes and route the form.

The screenshot shows the 'Route Document To' window with the following elements:

- 1**: Supervisor search field.
- 2**: Add Approver search field.
- 3**: Add Team search field.
- 4**: Add Staff to Notify When Final search field.
- 5**: A table with columns: Approver, Final Approver, Notify, Title, Name. The table contains two rows: 'Admitting Practitioner' (TANYA HEINRICH) and 'Staff' (SUSANNE DOC TESTING...).
- 6**: Submit button.

At the bottom of the window are buttons: Accept, Accept and Route, and Reject.

The document will be routed in this order: Supervisor > Approver(s) > Notify. **Note- If the document is routed to a Supervisor for approval, it will not be routed to other Approver(s) until the Supervisor approves the document.**

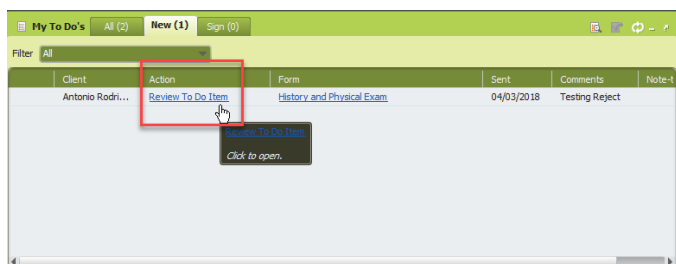
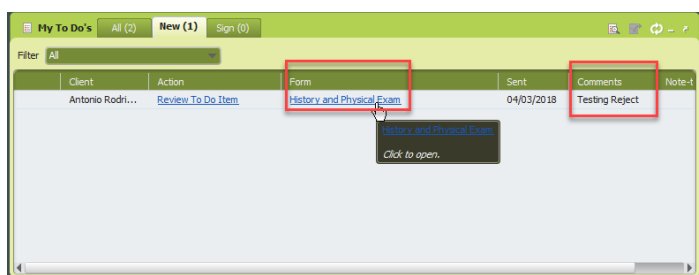
A green checkmark confirms your routing preferences. Note- check/uncheck the boxes above (Approver, Notify) as needed. Documents should not be routed to the same person as an Approver and to Notify.

BHD is not currently using Final Approver functionality.

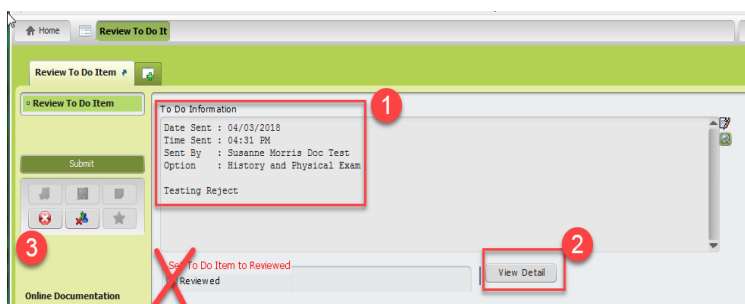
What Happens when a Document is Rejected

If a document is not approved as Final, the Supervisor will reject it and route it back with comments stating what needs to be added/changed/deleted (routed to the wrong person, etc.) These notices are found in the *Comments* column of the *My To Do's* Widget. View these comments directly from the widget and open the Form by clicking on the Form Name link in the *Form* column.

Clicking the link opens the document in Draft to make any necessary corrections. Mark the document as Final, Submit the form, and route it back to the Supervisor or Approver. Once finalized, the *To Do Item* is removed from the *My To Do's* list.



Note – The document can be reviewed (not opened) from the *My To Do's* Widget by clicking the Review To Do Item link in the *Action* column.



1. To Do Information and comments on the reason for reject are found here.
2. Click View Detail to review the entire document (see below).
3. **Caution!** - Do not check the Reviewed box. **Click on the red X** to close the form. Checking this box and submitting the form removes the *To Do* item from your *To Do* list.

After reviewing the document TIFF (step 2 above), click the red X to close the TIFF and close the form as above to return to the *My To Do's* widget. Click on the form name link in the *Form* Column to open the document, make corrections, Finalize and Submit. Route the document for approval.

